



## REQUEST FOR ASSISTANCE (RFA) FORM INTAKE INTERVIEW LOG

<b>Date:</b> 1/25/17	<b>Interviewer:</b> Sue Guenter-Schlesinger (SGS)	<b>RFA #17 – 05</b>
<b>Name of Person(s) Requesting Assistance:</b> [REDACTED]		
<b>Contact Numbers (telephone, e-mail, etc.):</b> [REDACTED] (home number) or [REDACTED] (WWU)		
<b>Status of Person(s) Interviewed (title, position, student status, etc.):</b> WWU staff in [REDACTED]		
<b>Requested Assistance Pertaining To (name, position, policy, project, etc.):</b> Behavior from supervisor		

To the best of your knowledge, please fill out the following:

Interviewee Status:    Male ☐ Female ☒    Administrator ☐ Faculty ☐ Staff ☒ Student ☐  
 Concern Regarding:    Male ☐ Female ☐    Administrator ☐ Faculty ☐ Staff ☐ Student ☐

**Category:** *(Please check at least one)*

<input type="checkbox"/> Age	<input type="checkbox"/> Color	<input type="checkbox"/> Creed	<input checked="" type="checkbox"/> Disability	<input type="checkbox"/> Veteran Status
<input type="checkbox"/> Marital Status	<input type="checkbox"/> National Origin	<input type="checkbox"/> Race	<input type="checkbox"/> Religion	<input type="checkbox"/> Retaliation
<input type="checkbox"/> Sex/Gender	<input type="checkbox"/> Sexual Harassment	<input type="checkbox"/> Sexual Orientation	<input type="checkbox"/> Employment	<input type="checkbox"/> Genetic Information
<input type="checkbox"/> Gender Identity or Expression				

Time Line		
Date	Item	Comments
1/13/17	[REDACTED] visits EOO	Requesting a meeting with EOO staff regarding what she considers bullying behavior from her new supervisor, which she feels may relate to her disability.
1/25/17	SGS meeting with [REDACTED]	See notes in file [REDACTED] did not want to share Supervisors name at this time or have Sue contact HR as she requested in order to better understand situation. [REDACTED] said she would think about it and get back to Sue.
2/2/17	Meeting scheduled with [REDACTED] but SGS needed to cancel due to conflict.	
2/15/17	SGS meeting with [REDACTED]	See notes in file. [REDACTED] gives Sue her supervisor's name and says ok to talk with her as well as with Lea Aune and Julie Moon in HR. She feels she is being bullied and that some of it may have to do with her disability. [REDACTED] is worried because she ran over her lunch time. Sue offers to call supervisor and let her know she was visiting with EO Office. She talks to [REDACTED] to explain and says [REDACTED] is happy to make up time (about 20 minutes). Sue indicates that she will be back in touch with [REDACTED] in next several weeks.

2/16/17	████ visits EOO	Delivered copies of emails from her supervisor that she wanted Sue to see. █████ feels they are retaliatory. █████ has not indicated that she is interested in filing a complaint.
2/17/17	████ visits EOO	Delivered copy of letter regarding her accommodation, as well as contact information for her former supervisor, █████.
2/21/17	SGS and Mallory Sullivan meeting with Lea Aune and Julie Moon	SGS and Mallory review █████ accommodation requests; the accommodations she is being provided; her job description. SGS and Mallory indicate that █████ believes she is experiencing bullying and that some of it may be related to her disability.
2/22/17	████ delivered to EO Office letter for SGS	See letter.
2/22/17	████ email to SGS	Asking if SGS met with █████ supervisor.
2/24/17	████ email to SGS	Asking when SGS is available to meet. SGS asked Lynae to schedule a meeting for █████ with Mallory Sullivan, Title IX/Civil Rights Investigator, the week of February 27 <sup>th</sup> .
2/24/17	Lynae Rickman email to █████	Proposing meeting for █████ with Mallory for 3/2 at 1:00 pm. Lynae will send an Outlook invite.
2/27/17	████ email to Lynae	████ needs to reschedule the meeting with Mallory and would like to include Mary Ann Armstrong, union rep, in the meeting when it is rescheduled.
2/27/17	Lynae/████ email	Lynae emailed █████ to let her know times she can meet don't work with Mallory's schedule. █████ wrote back that it was fine to schedule for the following week.
2/28/17	Mallory email to █████ and Mary Ann	Proposing meeting for Mallory with █████ and Mary Ann for 11:00 am on 3/7/17. █████ and Mary Ann both followed up with Mallory to indicate that this meeting time would work for them.
3/6/17	SGS email to █████ and Mary Ann Armstrong (union rep)	In discussing █████ situation with Mallory, SGS feels that it is important that SGS be part of the meeting as well. SGS is not available for the meeting time on 3/7, so █████ and Mary Ann will be receiving an Outlook calendar invite for Friday 3/10. See email in file. █████ agrees to meet on 3/10/2017.
3/7/17	████ called EO Office	████ spoke briefly with SGS. █████ is not feeling well, can't make meeting today. SGS let █████ know that's just fine, and Lynae will call her back later in the day to follow-up.
3/7/17	Lynae Rickman t/c with █████	████ indicated 3/10 should work for her but she would not be able to confirm until she is back at work. █████ asked Lynae to follow-up with Mary Ann to make sure she knew the meeting was not happening today, and to see if Friday (3/10) worked for her.
3/7/17	Lynae Rickman t/c with Mary Ann Armstrong	Lynae confirmed with Mary Ann that the meeting for today had been rescheduled for Friday 3/10 at 11:00 am.
3/9/17	Mallory email to █████	Mallory explains to █████ that 3/10, after looking at schedules has a conflict and proposes 3/13 at 9 AM and shares that Mary Ann and Sue are both available at that time.
3/13/17	████ call to EO	████ called to let Mallory know that the 9 am meeting will need to be rescheduled as Mary Ann learned she has a departmental meeting scheduled

	Office	for the same time and is no longer available to attend.
3/13/17	Mallory email to [REDACTED] & Mary Ann	Confirming that the meeting that was scheduled for today will be rescheduled, but that Sue and Mallory will be away from the office the remainder of the week. They will be back in touch to propose a meeting time.
3/20/17	[REDACTED] visits EO Office	[REDACTED] asked Lynae for an update as to when a meeting will be rescheduled. Lynae says that Mallory will get back to her.
3/31/2017	Mallory call to [REDACTED]	Called to schedule follow-up meeting [REDACTED] is out of the office. She is expected to return Monday (4/3/2017). Sent follow-up email.
4/3/2017	[REDACTED] email to Mallory	[REDACTED] informed Mallory that her mother had a stroke and she will be away from the office.
	Mallory email to [REDACTED]	"I am so sorry to hear about your mother. I will hold off on rescheduling the meeting until I hear back from you. In the meantime, I will at least plan to look at dates for next week (week of April 10, 2017) instead of this week. "
4/17/2017	[REDACTED] email to Mallory	[REDACTED] is back in the office and available to meet.
4/18/2017	Mallory email to [REDACTED]	Offer to meet 3/21 at 3 PM. Confirm attendance with union representative.
4/21/2017	Mallory meet with [REDACTED] and Mary Ann	Discussed the role of the EO office and the types of concerns that EO can address. [REDACTED] shared concerns about rude or bullying behavior of her co-workers, which [REDACTED] stated she did not believe was due to her disability, and Mallory informed [REDACTED] that EO does not address concerns of that nature. If [REDACTED] wants to file a complaint with EO, EO can only address concerns related to discrimination and retaliation. Mallory provided [REDACTED] with written copies of WWU's discrimination policy and complaint procedure. Mallory informed [REDACTED] of her options to file a complaint with the EO office (either formal or informal) and described the process for each. Informed [REDACTED] that she would need to inform EO if she would like to move forward with a complaint, and if so, if she would like to use a formal or informal complaint process. [REDACTED] was unsure and will follow-up. Mallory informed [REDACTED] we will need to hear back from her to move forward.
5/19/2017	[REDACTED] stopped by EO office	[REDACTED] stopped by the EO office and spoke with Mallory briefly. [REDACTED] informed Mallory that she would like to file a formal complaint. Mallory said that she had a meeting at the time, but that she would be happy to set a meeting to talk with [REDACTED] and start the process. Mallory set a meeting for 5/30, [REDACTED] said that she might want to move until later to give her time to prepare.
5/21/2017	[REDACTED] voicemail with EO	Would like to move the meeting to 6/5
5/22/2017	Mallory email to [REDACTED]	Confirming meeting for 6/5. Offer of union representation to attend meeting.
6/5/2017	Mallory meet with [REDACTED]	[REDACTED] would like to file a formal complaint. Mallory and [REDACTED] met to discuss information about filing formal complaints, including the more likely than not standard. Mallory reviewed information in a binder provided by [REDACTED] and asked clarifying questions on the material provided. Mallory informed [REDACTED] that it is likely that EO would not investigate allegations of failure to implement accommodations that occurred before the allegations were in place. Mallory

		and [REDACTED] were not able to complete discussion of the information and agreed to set a follow-up meeting.
6/12/2017	[REDACTED] call to EO	[REDACTED] called to share that she is out of office on FMLA leave. She is unsure how long she will be away from the office and will inform EO when she returns. Would like communication from EO back about timelines.